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Recent revisions

7/2/02  Added screen shots of Japanese IME; minor modifications to text throughout (marked in blue).
Lesson 1: Scope of CJK functions in Aleph

The Aleph Library System supports the display and input of vernacular Chinese, Japanese, and Korean (CJK) data. Harvard's contract with Ex Libris called for developments that would improve Aleph CJK functionality, with many to be delivered by or before our switch to production on July 8, 2002.

These functions will be available when Harvard switches to Aleph on 8 July:

- Search and display of vernacular CJK (OPAC and Staff client)
- Creation and update of paired fields (vernacular CJK and romanization) in bibliographic records; but note:
  - Authority records will not support vernacular CJK, and
  - Vernacular CJK headings will not have authority cross-references in indexes

These functions will be available as soon as possible after 8 July:

- Initial load and ongoing import of utility vernacular CJK records into Aleph
- Export of Aleph vernacular CJK records to utilities
- Vernacular CJK in Aleph printed products (e.g., orders, claims, etc.)

Configuring Aleph to suit Harvard needs is an ongoing process that will continue well past our July 8 cutover date. Please be prepared to experience frequent changes to displays, functions, contents of indexes, etc. It is possible that a few details of what you see in this workshop will change by the time you start using Aleph on July 8.

Also note that successful Aleph implementation requires taking a hard look at the long list of system developments and prioritizing which of these must be accomplished by July 8. Some developments will be delayed until after implementation either because other functions have a higher priority or circumstances require that we wait. Import and export of vernacular CJK data are examples of functions that are important but must wait until after July 8.
Lesson 2: Input methods

2.1 Locale

Locale is a new feature of Microsoft Windows. Locales add language and other country features to the operating system language for the desktop. Windows 2000 supports different language locales including Chinese, Japanese and Korean. For proper CJK functionality in Aleph, these particular Locales must be added to the standard Windows 2000 install. (Instructions on how to do this follow.) While one or more of the CJK Locales need to be installed, it is recommended that English (United States) be the default Locale in operation on the desktop.

But adding the Locale alone does not allow you to input characters from other languages. You need to have another language input software installed in your computer in order to type characters from the other language. Microsoft Windows 2000 have built in language software called Input Method Editors or IME that allow you to type texts in Chinese, Japanese, and Korean as well as other languages. These also have to be added.

So you must have the Chinese, Japanese and/or Korean Locales installed and the Input Method Editor that you need.

Note: We are experiencing some problems with entering CJK characters in Aleph modules (other than the search module). This will change in future releases of Aleph versions.

2.2 Microsoft Input Method Editors (IME)

Microsoft IME is language software that transliterates English Keyboard Layout to vernacular characters in word processing. Windows 2000 provides several Chinese IME and one Japanese and one Korean IME. The IME indicator is located on the bottom right corner of the screen. It is marked with “EN” when English input mode is activated on your computer.

- To activate an IME, simply click on the IME indicator in the bottom right of the screen (it is often set at “EN”)
- Click on one of the IMEs from the pop up menu. The toolbar for that IME will display.

For the purpose of data entry in Aleph, this Guide describes three Chinese IMEs, the Japanese IME and the Korean IME. You may practice with any other IME on your own.

Hot keys:

- Use Alt+Shift to switch between different windows applications.
- When an IME is active, use Alt+Tab to switch to a different IME.
Chinese IME

You may need to know all three Chinese IME if you want to enter both traditional and simplified characters. (Pin Yin98) allows you to input only simplified characters. (New Phonetic) allows you to input only traditional characters. (MS-Pin Yin98) allows you to input both simplified and traditional characters, but has less traditional characters than (han yu pin yin). You can use (MS-Pin Yin98):

This input method allows you to enter both Chinese characters and English letters, as well as both simplified and traditional characters.

After you have selected and the toolbar is showing:

Settings and Options:

To switch to English input mode:
  - Click on , the character is changed to
To switch to Chinese input mode:
  - Click on or press Shift key, the character is changed to
If you want to enter simplified characters:
  - Click on , just right of the keyboard icon, the character is changed to . now it is set to Simplified.

If you want to enter traditional characters:
  - Click on , just right of the keyboard icon, the character is changed to . now it is set to Traditional.

You can also switch the punctuation settings between Chinese and English:
  - Click on the punctuation button just left of the keyboard icon on the toolbar.

Also for this Input method there are several keyboard sets.
  - Click on the little hand, just left of the purple help book icon. This will give you a pop up list you can choose from
  - To get help on this input method, click on help: the purple help book icon.

**Inputting**

**Character visibility**
  - As you type Pinyin Romanization, the first character is visible after second character is entered -> Or you can make it visible as soon as you enter the Pinyin Romanization by pressing the space bar.

  - You may store the characters in a temporary storage space before adding to the text. Click on the little hand, just left of the purple help book icon, then select or press letter C, the temporary storage space shows up.
Choosing the correct character
- The characters first appear with a broken underline. This means you are allowed to change the characters.
- To change the characters, simply press the Back Arrow Key on underlined characters. A selection of characters will appear. Enter the number next to the character of your choice.
- When all the characters for the sentence or phrase are correct, press the Enter key to finalize it. The broken underline will disappear. You can no longer change the characters in this sentence or phrase.

(Pin Yin98):
This input method allows you to type simplified Chinese characters and English letters. After you have selected (Pin Yin98) and the toolbar is showing:

Settings and Options
To switch to English input mode:
- Click on the Microsoft red-green-blue-yellow symbol, the first icon. It changes to “A”.
To switch to Chinese input mode:
- Click on the “A”, the first icon. It changes to Microsoft red-green-blue-yellow symbol.
Inputting

This input method supplies a drop down list of choices of possible characters, words and phrases as you type. In another words, when you type part of the Pinyin Romanization for the character, you may get the whole character as one of your choices. When you type part of the Pinyin Romanization for the phrase, you may get the whole phrase as one of your choices.

Example: You do not need to type zhong to get the character . As soon as you type zho, the pop up menu will give you along with choices of other characters (e.g.). To enter the character of your choice, simply type the number next to the character of your choice. If you want enter , you need type only zhongh instead of zhonghuarenmingongheguo (e.g.).
(New Phonetic):
This input method allows you to type traditional Chinese characters and English letters. It also allows you to enter characters with Pinyin Romanization.

After you have selected (New Phonetic) and the toolbar is showing:

Settings and Options:
Your keyboard needs to be set to Pinyin Romanization. If it is not configured to enter Pinyin Romanization with this input method, you may follow the next set of instructions to configure your keyboard.

1. Put the cursor on the first icon on the toolbar and right click.
2. Choose (R)
3. Click on the middle tab marked as
4. Choose , second button from bottom (see example below)
5. Click OK
To switch to English input mode:
- Click on  , the first icon or press the shift key. It changes to “A”.

To switch to Chinese input mode:
- Click on the “A”, the first icon or press the shift key. It changes to  .

For help on this input method, click on the little purple help book.
Inputting

Character visibility
As you type, the first character is visible after second character is entered - Or. Use the space bar to instantly display the character or the word you just typed.

Choosing the correct character
- The characters first appear with a broken underline. This means you are allowed to change the characters.
- To change the characters, simply press the Back Arrow Key to highlight the character that need to be changed. Then use the Down Arrow Key to display the character selection menu. Enter the number next to your selection.
- When all the characters for the sentence or phrase are correct, press the Enter key to finalize it. The broken underline will disappear. You can no longer change the characters in this sentence or phrase.
Special Input Note:
How to enter characters with the Pinyin value of ü? For example, you need to enter “falü” for . Instead of typing falu, you need to type falv. “V” in Microsoft IME is the equivalent of “ü”.

Japanese IME

After you have selected Microsoft IME 2000 (Japanese) and the toolbar is showing:

Settings and Options
You can choose either the Roman alphabet or hiragana or katakana for input. (Use Full-width Hiragana to input unless you want to enter Katakana):
- Click on the small scripts button, the first icon from the left on the toolbar). A pop up list appears for you to make your selection.

- Use the Alt and Accent Grave Key (the one above the Tab Key), or click on the first button on the toolbar to switch input mode between English and Japanese.
- For help on this IME, click on the last button with a question mark on the toolbar.

**Inputting**
Type in the Romanization for a Japanese word or character.
- Hit the space bar once or press the Enter Key to instantly display a word or a character.

**Choosing the correct character**
- The characters first appear with a broken underline. Hit the space bar twice for a drop down list of possible kana or kanji.
- Use the Down Arrow Key to highlight the word or character of your choice, then press Enter. Or enter the number next to your choice, then press Enter.
Proper names

Many words can be entered independently, but names can be a problem and may have to be entered character by character. The example below illustrates the name " " can not be input as a word, but must be entered character by character.
Japanese Long “O” and “Long Bar”

Long "o" (i.e. "o" requiring a macron) is entered in different ways. For 麗, it is entered as Kenpou. For 長, it is entered as Oosaka. For 町, it is entered as O_to. Enter “uu” to get the character represented by “u” with a macron.

Press the hyphen/underscore key (next to the key with +/-) to input a "long bar" as used in or . Macron availability for Roman input will be discussed in the GUI Staff Search component of the workshop.
Korean IME

The IME for Korean language allows you to enter English letters, Hangul and Hancha characters.

After you have selected the Korean IME and the toolbar is showing:

**Settings and Options**

To switch to English input mode:
- Click on the button with the character on the toolbar. The character changes to “A”. Or press the Alt Key, right to the Space bar.

To switch to Korean input mode:
- Click on the “A”, the first button on the toolbar. It changes to . Or press the Alt Key, right to the Space bar.
Unlike Chinese and Japanese IME which uses English (USA) keyboard to enter Romanization. Korean IME requires a Korean keyboard layout to enter Romanization for Hangul. The following Keyboard layout is for your reference.

As you can see, characters are entered according to Korean Alphabets, not the Romanization in the Korean IME. For example, ( ) is Romanized as Minpop according to LC Romanization scheme, but entered with keys of ALS/QJQ.

**Inputting**
Type in the Romanization for Hangul.

Choosing the correct character
- Hit the space bar to enter a character.
- When a character is highlighted, this Hangul character can be changed to Hancha.
- Click on the button with the character on the IME toolbar, a selection of Hancha characters appears.
- Then enter the number next to the choice of your character.
Korean IME
2.3 Adding Input methods to your desktop computer

If you want to activate or add new input methods to your desktop computer, follow these steps.

Install Locale
First you must have the Locale for the country installed. To do this:

1. From the Start button, Settings / Control Panel / Regional Options
2. Under “Language settings for the system” Check off the box next to the country you want to add Input methods for.
3. Note: Chinese is listed under Simplified Chinese and Traditional Chinese
4. After you have checked off what you need you must reboot the machine.
5. This only has to be done once.

Add Input Languages
From Start button, go to Settings; choose Control Panel, then Regional Options. Once you are in Regional Options:

1. Click on Input Locales tab
2. Click on Add

Add Input Locale
Now a new Add Input Locale window opens up, here you need to do two things:

1. In Input Locale box, choose one Chinese, or Japanese or Korean input locale.
2. In Keyboard Layout/IME box, choose input method such as Chinese (traditional)-New Chang-Jie
3. click OK, and then OK again
Lesson 3: Searching for CJK Records in Aleph

There are two types of searches that can be performed in both the Public Catalog and in the Search Module:

- **Browse Search**: Searches headings of titles, authors, subjects, etc.
- **Keyword Search** (called Find Search in the Search Module): Searches for keywords in records as well as keywords in specific indexes such as titles, authors, subjects, etc.

### 3.1 CJK Search Characteristics in Aleph

**Keyword Searches:**

- Keyword searches retrieve records in Chinese, Japanese and Korean all at the same time.
- Character adjacency is the default, meaning that results will produce records with the desired characters next to each other and in left to right order.
- Default sort for vernacular keyword search results is in descending order by year (same as for non-vernacular keyword searches)

Figure 1 OPAC example of a vernacular keyword search
Figure 2 OPAC example of vernacular keyword search results in Chinese, Japanese, and Korean

Figure 3 Staff client example of vernacular “find” (keyword) search and brief results list in romanized form. Vernacular characters will display in full record.
Browse Searches:

- When browsing indexes, you choose the language index you wish to search and you will then get results in that specific language (e.g. Titles Chinese, Titles Japanese, etc.)
- A vernacular browse search produces an ordered list of results
- To search other indexes on the browse search menu in Aleph you must use romanization

The example below illustrates a useful and straightforward list of Chinese titles beginning with the search term…

Simply enter the term and click on Browse. The results, sorted in pinyin order, show all the titles in the list starting with the search term. You can browse forward or back in the list by clicking Previous Page or Next Page.

Figure 3 OPAC example of Chinese title browse
Figure 4 OPAC example of results for Chinese title browse - in Chinese language and sorted by pinyin

Figure 5 Staff client example of "Titles Chinese" vernacular results list sorted by pinyin
3.2 CJK Search Strategies

Keyword Searches:

- Using the "or" command in keyword can provide useful results for CJK users. For example, conducting a search with terms in vernacular "or" romanization will retrieve records that have vernacular and only those that only have romanized fields.
- The "or" command can also be used to retrieve records with the search term written either in Chinese characters or the phonetic kana/hangul.
- Users can focus searches by using the "and" command. For example, and Architecture combines vernacular and an LC subject term for narrower results.

![Figure 6 Example of keyword search combining vernacular and romanized terms with "or"](image)
Figure 7 "or" results in both vernacular and western languages
3.3 Search Results for CJK Searches

It should be noted that some fields in search results may not properly display vernacular script. This problem is being worked on and should be resolved by implementation.

Keyword Searches:

Even when characters are input in the vernacular, the brief list will only display a romanized brief form for the records. It will be necessary to click on an individual record and see the Full display to determine if a particular record has vernacular fields.

Browse Searches:

- Results for Chinese language browse searches will sort "alphabetically" by pinyin
- Results for Japanese and Korean browse searches are sorted by Unicode value; the results will not sort "alphabetically" by pronunciation. Please note that browse results in these languages will not sort in the order you may be used to seeing in other applications.

![Figure 8 Results for Japanese author browse - in Japanese and sorted "non-alphabetically" by unicode value](image)
Searching Differences Between the Public Catalog and the Staff Search Module

Index menus vary slightly:

<table>
<thead>
<tr>
<th>Index Menu Differences: Public Catalog vs. Aleph Search Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Catalog Browse Index</td>
</tr>
<tr>
<td>Chinese: Author</td>
</tr>
<tr>
<td>Chinese: Title beginning with…</td>
</tr>
<tr>
<td>Chinese: Subject beginning with…</td>
</tr>
<tr>
<td>Japanese: Author</td>
</tr>
<tr>
<td>Japanese: Title beginning with…</td>
</tr>
<tr>
<td>Korean: Subject beginning with…</td>
</tr>
<tr>
<td>Korean: Author</td>
</tr>
<tr>
<td>Korean: Title beginning with…</td>
</tr>
<tr>
<td>Korean: Subject beginning with…</td>
</tr>
</tbody>
</table>

In addition, the **Search Module** offers these additional browse indexes:

- Title on piece Chinese
- Title on piece Japanese
- Title on piece Korean
- Title on piece (serial only)C (Chinese)
- Title on piece (serial only)J (Japanese)
- Title on piece (serial only)K (Korean)

Despite these slight differences, both browse and keyword searches work the same way and with similar results in both the OPAC and the Search Module.
3.4 IME functions in the Search Module

The Search Module IME functions differently from the IME in the Public Catalog.

When inputting in the search field in the Search Module, words that you initially type will not display. To see the characters:

**Chinese Input using Microsoft IME (MS-PINYIN98) in the Search Module:**

1. To display a word or a character, hit the Space bar once and then hit the Enter key; or hit the Enter key twice
2. To change a character after re-entering Romanization, hit the Space bar once and then press the Left Arrow key; type the number next to the selection and hit the Enter key

**Traditional Chinese Input using New Phonetic**

1. To display a character, hit the Space bar once, then hit the Enter key; or hit the Enter key twice
2. To change a character after re-entering Romanization, hit the Space bar once, then press the Down Arrow key. Use Down Arrow key and Right Arrow key to highlight the character, type the number next to the selection and hit the Enter key

**The Japanese IME**

1. To display a word or a character, hit the Space bar once, then hit the Enter key
2. To change the word or character after re-entering Romanization, hit the Space bar twice. Type the number next to the selection and hit the Enter key

**The Korean IME**

1. To display a character, hit the Space bar once, or continue typing, the first character will show up after the second one is entered
2. To change Hangul to Hancha, click on the Hancha button on Koran IME toolbar immediately after re-entering Hangul, then type the number next to the character on the selection menu

**Macron**

You cannot use the Macron input method in the Public Catalog, but the Search Module will support the use of Macron in Japanese IME or in the English IME. This method requires using the Unicode value for the macron over a particular letter. For example: "ö" = F11 and then 014d. This functionality is most useful in Cataloging edits since search results are the same with or without the macron.
Lesson 4  Editing CJK Bibliographic Records

4.1  When to Edit a CJK record in Aleph

Once Aleph is up and running, the highest priority will be to load Harvard's CJK vernacular records from RLIN. These records will replace the romanized CJK records that have been converted from HOLLIS.

Although on July 8th it will be possible to input CJK characters in Aleph, there are several reasons that staff should continue to create full cataloging records in the utilities, OCLC and RLIN:

- CJK input in Aleph is more time consuming and cumbersome than input in OCLC or RLIN, and
- the utilities are not yet able to accept exported CJK data from Aleph.

If we were to catalog these records completely in Aleph, they would not be available in the utilities. Therefore, for the most part, editing in Aleph should be limited to minor updates of records and creation of provisional bibliographic records to be used for ordering purposes.

CJK work in Aleph should include:
- Minor corrections (correcting spacing, misspellings, notes, etc.)
- Entering provisional bibliographic records for ordering purposes
4.2 Searching for a record and pushing it to the Cataloging Module

Most searching will be done from the Staff Search module because it has the most versatile indexes and search capabilities. Searches in the vernacular and in transliteration are available. From the Staff Search module, you can push the record into the Catalog module, where it can be edited.

Reminder: only vernacular headings can be searched using Authors Chinese, Authors Japanese, Authors Korean, etc.; if you want find search results for records with and without vernacular, use another index. When searching for ordering purposes, it is may be a good idea to search using transliteration, as

Once you have search results, push one or more records from your results to the Cataloging module.

1. From search results (either Brief List or individual record in Full display), select a record.
2. Push the record to the Cataloging module by clicking on the "Catalog record" icon on the main tool bar: or from the main menu, select File / Catalog Record.
4.3 Unique Features of the CJK record

In Aleph, a MARC field with vernacular text must always be paired with the same field containing the text in transliteration. For example, a field 245 containing the vernacular title must be accompanied by a field 245 containing the transliterated title. Paired fields should have the same field and subfield tags and the same indicators.

**Subfield 6 (Occurrence number)**

Paired fields must contain a subfield 6 (occurrence number). Subfield 6 contains data that links fields that are different script representations of each other. Subfield 6 is always the first subfield in the field. In Aleph the subfield 6 contains only a 2 digit “occurrence number.” It is the presence of this subfield that will allow the system to accept the presence of duplicate fields.

![Figure 9 Example of paired fields with subfield 6 occurrence number](image)

**066 field and subfield 6 in paired fields**

Records that include characters from the East Asian character set should contain an 066 field. This field contains only the code “$1” in the subfield a.
4.4 Editing existing records in Aleph

Locking the record

The first step in editing a record is to lock it. This prevents other users from editing the same record simultaneously and changing the record in a way that will prevent the server from accepting your changes.

To lock a record, select **File / Lock Record** from the main menu.

Adding/deleting text, fields and subfields

Editing fields that already exist works like a word processor. The insert mode is on unless you toggle it off by hitting the insert key. Lines wrap automatically. To delete text, either use the **Delete** key until the text is gone or highlight a string of text and then use either the spacebar or the **Delete** key.

Using the spacebar in a string of text will insert one space.

To change a tag, indicator, or subfield code, type the new text over it. To erase an indicator, use the spacebar.

If you inadvertently change something, use the **Undo** function in the **Edit** drop down menu.

Adding diacritics and special characters

There are currently two ways to add diacritics and special characters. One is by using the Aleph-supplied **floating keyboard**, the other is by entering the **unicode keyboard combination**.
Inserting characters from the Floating Keyboard

The floating keyboard allows you to input a subset of the ALA character set that cannot be directly input by your computer’s keyboard. Diacritic marks are generally represented as a combination of the mark and the letter and are listed alphabetically in the floating keyboard.

1. From the **Options** drop down menu choose **Activate keyboard**.
2. Select the diacritic-character combination from the floating keyboard. Character will display in the text entry area below the keyboard.
3. Position your cursor at the insertion point. Use **CTRL + V** to paste the character (you do not have to close the floating keyboard first and you do not need to first copy the character by using **CTRL + C**; text that you enter in the floating keyboard is automatically put into the Windows clipboard).

Note that you can type entire words/sentences into the floating keyboard (with multiple diacritics) and paste them into the record.

Inserting characters using unicode values

1. Place the cursor where the diacritic should be entered.
2. Hit **F11** and note that the title bar of the record now indicates **Unicode mode**.
3. Enter the unicode value **\[014D:zero-one-4-d\]** (refer to the chart of unicode values. Remind learners that not all unicode values are available in Aleph—they must use the authorized list).
4. When you have finished entering the diacritic(s), hit **F11** again to disable the unicode mode.
Lesson 5  Creating a provisional record

Creating a record from a template

The recommendation has been made to OIS that system supplied CJK bibliographic templates be added to Aleph for each format. These templates should be available after Harvard switches to Aleph on 8 July.

Using a template, you can simply fill in the fields that you want to use and leave unneeded fields blank. The blank fields will disappear when you hit “Enter.” Remember not to hit “Enter” before you are finished entering text.

It may speed input to create all vernacular fields at once and all of the transliterated fields later or vice versa. Remember to check the fixed fields to ensure that the codes are correct.

Opening an Aleph template and creating a record:

1. Click on Template icon or select File / Open template from the main menu.

2. Select a template from the list. Aleph will open a new bibliographic workform with fields and values supplied by the template.

3. If necessary, click on the LDR and/or 008 and press control - f to edit them.

4. Add necessary bibliographic data. Remember the need for paired fields, each with appropriate occurrence numbers in subfield 6.
Figure 11  Example of template contents for CJK bibliographic record

It is also possible to enter text in a record by copying from a record with similar fields and pasting text into a new record. Because the record that you are creating stays on the screen until you close it, you can easily call up another record that has the text that you want to use and copy several fields into the record that you are creating.
Lesson 6  Searching authority headings

From a displaying CJK bibliographic record, you can search for authorized headings in the same way that you search for them from records in Roman languages.

**Note:** At the moment, this search is mistakenly including the contents of subfield 6 (the occurrence number). This has been reported to Ex Libris and we expect it will be fixed sometime soon after our 8 July implementation.

**Note:** The Aleph authority file supports only transliterated headings (not vernacular headings).

Aleph allows you to search headings in other bibliographic records within the current library (e.g. HVD01, the main library) or within another library (e.g. HVD10, the authority file).

![Figure 12 Search menu options in Cataloging module](image)

**How to search headings in the current library**

1. With a record displaying, place the cursor on the field to be checked.

2. From the main menu, select **Search / Search field headings of current library**.

   A list of headings will appear; the closest match will appear highlighted and second on the list.

3. If there is an authority record, authority information will appear in the **Auth. info.** column. To view the authority record, highlight a heading and click on **Expand**.

4. To see other records using that heading, click on **View Docs**.
5. If you find the appropriate heading in the list, select it and click on OK to replace the heading in your record with this heading. If you find multiple occurrences of the same heading, be sure to use the authorized form (the one with an authority record).

**How to search headings in another library**

1. With a record displaying, place the cursor on the field to be checked.

2. From the main menu, select **Search / Search field headings of other library library**. A list of libraries will appear.

3. Select the appropriate library and click OK. A list of headings will appear; the closest match will appear highlighted and second on the list.

4. If you want to view the authority record, highlight a heading and click on **Expand**.

5. Click on the OK button to replace the heading in your record with the authorized form from the authority record. If there is no authority record for the heading, click on Cancel.

**About searching for transliterated headings**

From a CJK bibliographic record, transliterated headings can be searched in both the current library (the database from which the record came) and in the authority library (HVD10). You can then select a heading from an existing record and enter it into the record you are creating.

**About searching for vernacular headings**

Vernacular headings do not exist in the authority file, but can be searched in the main library (HVD01) using **Search field headings of current library** and then entered in your record. Once you have found the heading and entered it in your record, you may have to reenter the occurrence number in subfield 6.
Lesson 7  Validating the record

Once you have edited a record, you can choose to validate either the entire record or a single field. The presence of the subfield 6 in paired fields is required in order to prevent the validation program from producing a forbidden error that will prevent you from saving the record.

Errors will be displayed in a list. Warnings and can be overridden, but “Forbidden errors”, noted with a red exclamation mark, must be corrected before the record can be saved to the server.

![Figure 13 Example of list of validation errors](image-url)
Lesson 8  Saving the record

There are two options for saving records: **Save on local drive** and **Save on server and local drive**.

**Save on local drive** will save a record onto your PC’s hard drive, but not to the server. A record saved this way will not be available in the OPAC, but will exist only on your hard drive.

**Save on server and local drive** will save the record on the server, making the record available in the OPAC. When a record is saved, any empty fields or subfields will be deleted, and fields will be ordered. Also, records will automatically run through the validation process when they are saved to the server.

To save a record back to the server:

1. Click on the **Save on server and local drive** icon.
2. A prompt will appear; choose **Continue**. This may open up a Validation Error Window.